

LAWYERS BOARD 2017 VOLUNTEER OF THE YEAR TERRIE S. WHEELER



Terrie has been working in and with law firms and attorneys since 1985. In 1997, she saw several unfilled business development and marketing needs in other service professions and leveraged her 12-year legal marketing career by launching Professional Services Marketing, LLC (PSM).

PSM's focus is two-fold: They deliver an outsourced marketing department to firms of all sizes and business development coaching for individual attorneys and practice groups. PSM clients are primarily in the legal and financial services industries, but they also work with other professionals and service companies in other industries.

Prior to founding PSM, Terrie headed the marketing department at three of Minnesota's largest law firms. Terrie and her staff led all business development efforts for the entire firm as well as for practice groups and individual lawyers. Terrie created, implemented, and managed highly targeted and results-oriented marketing strategies.

Terrie is asked frequently to speak at meetings of professional associations such as the American Bar Association and various state bar associations. Terrie has more than 20 years of experience doing CLE presentations, facilitating retreats, and lecturing at law schools.

Terrie is also a prolific writer on law marketing issues and opportunities. Every month, she writes a column on "How-To" business development tips for *Attorney at Law Magazine*, syndicated in over 20 markets across the country. Terrie is also an ongoing contributor to the American Bar Association's *GP/Solo e-Report*.

When not coaching attorneys, or helping to manage her clients' outsourced marketing departments, Terrie loves spending time with her husband of 30 years, Jim. They have over 40 acres of paradise just one hour north of the Twin Cities. In winter, there's plenty of space for them to snowshoe or commune with nature by the fire pit. When Terrie was in school, she was a ballet skier (which is like ice dancing but on skis) and she still enjoys

schlossing downhill. But even she needs a break from the northland's cold! She tries to hit a Caribbean beach every year or two for the warm sun and the opportunity to bond with fish through her snorkel goggles.

Education

- Master of Arts Degree, *summa cum laude*, Business Communications, Graduate School of Business, University of St. Thomas, St. Paul, Minnesota
- Master of Arts Certificate in Public Relations, University of St. Thomas, St. Paul, Minnesota
- Bachelor of Arts Degree, *magna cum laude*, Organizational Management and Communications, Concordia University in St. Paul, Minnesota

Writing

Terrie is a nationally syndicated columnist for Attorney at Law Magazine.

Her articles are published in 22 markets across the country, with the most popular being: Minnesota | Phoenix, AZ | Chicago, IL | Los Angeles, CA | Atlanta, GA | Kentucky | St. Louis, MI North Carolina | Salt Lake City, UT | Dallas, TX | Tennessee

Ethics

Terrie is actively involved in helping educate lawyers on the ethics of marketing a law practice. Her involvement includes:

- MN Supreme Court Appointee, Vice Chair, Executive Committee, Lawyers Board of Professional Responsibility, May 2016 – present
- Chair, District Ethics Committee (DEC) Committee, Lawyers Board of Professional Responsibility, January 2016 – present
- Minnesota Supreme Court-Appointed Member, Search Committee for the Director, Office of Lawyers Professional Responsibility, 2015 – 2016
- Executive Committee, Board of Directors, Lawyers Board of Professional Responsibility, 2011 – present
- Investigator and Screening Committee Member, Hennepin County Bar Association Fourth District Ethics Committee, served for four years
- Past Chair, Minnesota State Bar Association's Marketing and Client Service Section, served for two years

Educator

Being able to help prepare new lawyers for life in private practice motivates and inspires Terrie. She is currently teaching marketing and client service at three law schools:

- University of St. Thomas Law School, Adjunct Faculty Member, presenting marketing and client service programming for third year law students, 2012 – present

- Mitchell Hamline School of Law, Adjunct Faculty Member, The Business of Lawyering course, 2012 – present
- University of St. Thomas Law School, CLE Presenter, created a four-part marketing program on marketing best practices for lawyers, 2014 – 2015
- Marquette University Law School, Guest speaker, Ethical Marketing Strategies for New Lawyers, 2014 – present